Analysis of High Street Retail in Burnley

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Contents

Introduction

The demise of the high street has been a regular headline. With the rise of online shopping, challenging economic conditions, and high rents it is difficult to maintain profits. Despite these factors, there is still an important continued place for high street retail.

This report analyses the environment in which the high street operates, from the macro, through the industry, down to the organization itself.
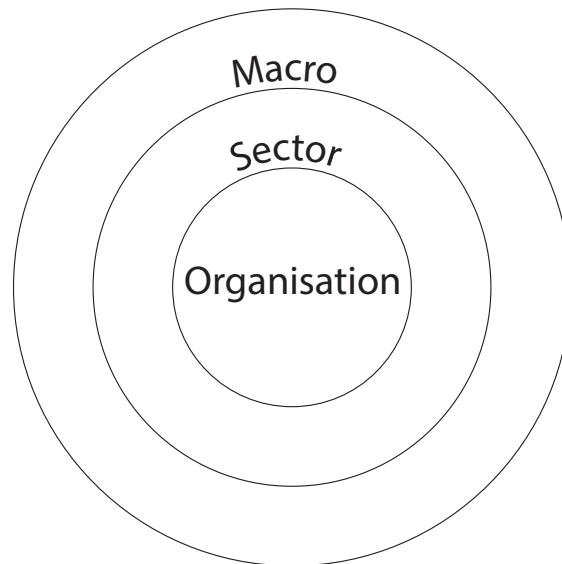

Figure 1: the layers of influence on a business

This approach enables a holistic understanding of the high street, it's current position in retail, and insight into the future.

Successful businesses do not exist simply to make money. Instead, their profits are a by-product of their central mission. For many high street businesses, their mission will fall somewhere between servicing their community, providing excellent service, and being an outstanding employer. Businesses can stay true to these goals and thrive, indeed, being on the high street can be a key asset in achieving them. The successful retailers of the future will likely be a hybrid of the best that technology and the high street can offer, rather than the return to a Victorian high street envisaged by Milt (2017).

Macro Analysis

Whilst the analysis of the macro environment has been performed at a national level, care was taken to view identified trends through the lens of Burnley information, for instance the population in Burnley is growing at a higher rate than the UK average (Office for National Statistics (2019c)), and the retail sector in Burnley is nearly 2% larger than the national average (Office for National Statistics (2019e)). The Ordanance Survey also note the high street is compact (2019), which as Roe (cited in Parliament. House of Commons (2019)) argues concentrates footfall.

Retail in Central Burnley

Overall Retail Businesses in BB11 post codes

KEY
- Specialist
- Food / Drink
- Fashion
- Convenience
- Chemist / Cosmetics

Author: James Lemin
Source: www.192.com
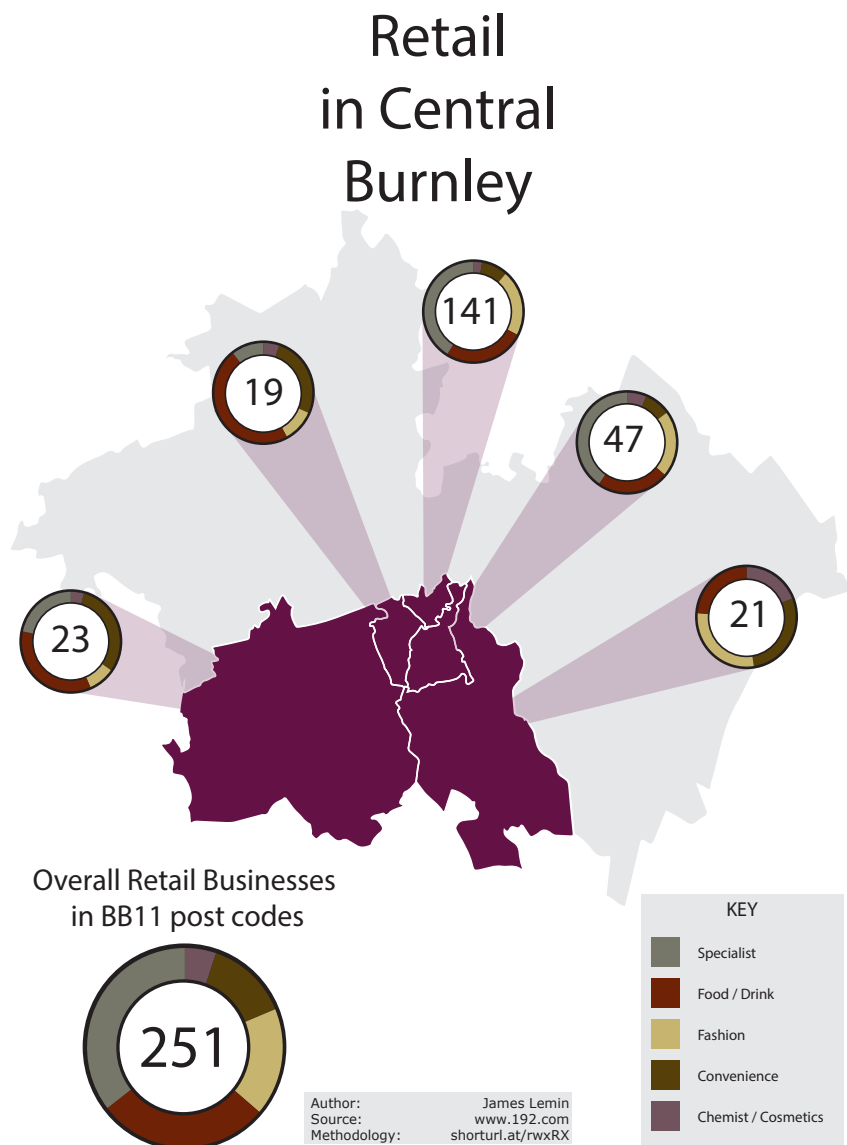Methodology: shorturl.at/rwxRX

Figure 2: Burnley Retail

Five main types of retail make up Burnley's highstreet:
  • Specialist
  • food/drink
  • convenience
  • fashion
  • chemists/cosmetics shops

Whilst the types of retailer differ, plotting these businesses on a BCG Matrix reveals their comparative similarity; they are all part of slowly expanding markets dominated by large players.
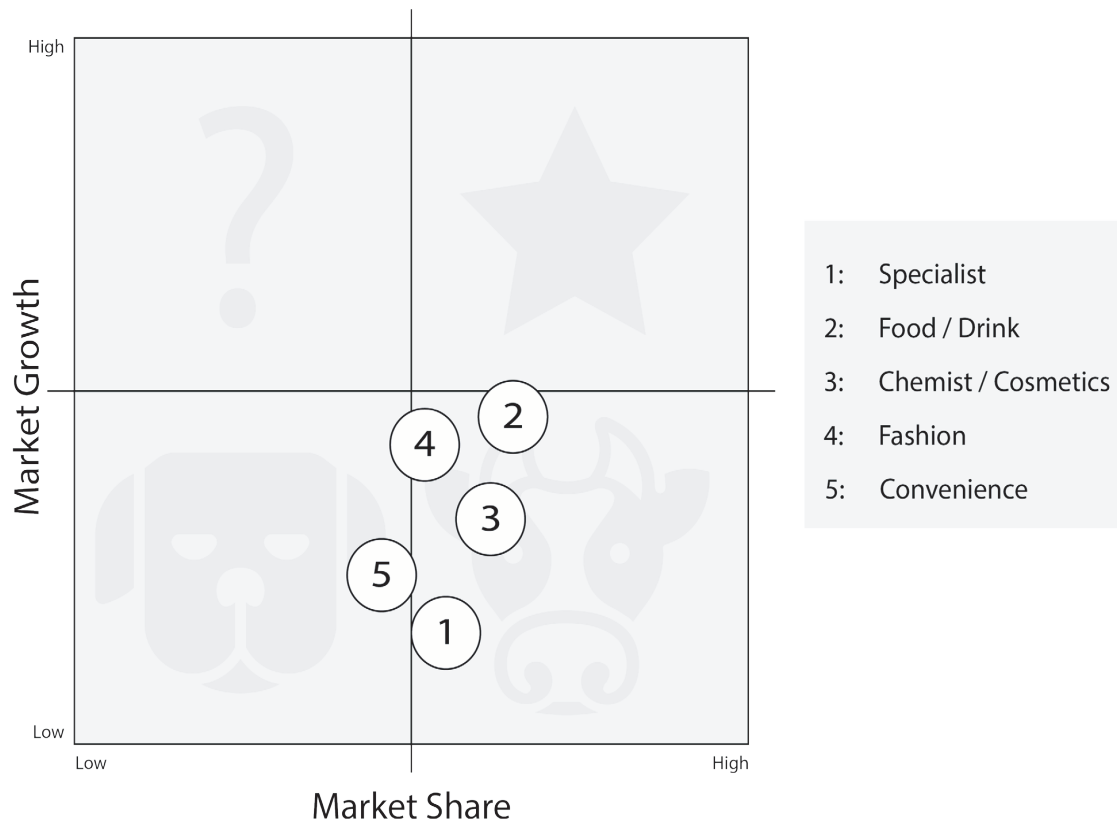

1:	Specialist
2:	Food / Drink
3:	Chemist / Cosmetics
4:	Fashion
5:	Convenience

Figure 3: Burnley Retail

PESTLE analysis identifies broad, external factors that affect the macro-environment (e.g. Britain). This analysis allows us to consider how these factors will affect the performance and activities of your business in the longer term.

Political

- Political will to prevent monopolies (e.g. the Asda/Sainsburys merger)[1]
- Business Rates taxation may be altered to 'level the playing field'[2,8]
- Suggested moves to revoke "nanny state" taxes[3]
- Brexit threatens the supply chain; uncertainty / stockpiling[4]
- Trade war between china & US[5]
- Central Initiatives to save the high street[6,7]
- Willingness to take on big tech[9]

Economic

- Sterling weakness makes imports more expensive, exports cheaper[11]
- Brexit uncertainty makes spending habits more conservative[4]
- Greater disposable income[12,13]
- consumer credit levels are at levels beyond that seen before crash in 2008[14]
- GDP growth is slow, negative last quarter[11]
- high levels of employment[12]

Social

- Burnley's population increasing by 2% year-on-year[16]
- Migration down: population is aging as a consequence[17]
- Tech products can trump traditional non-premium (e.g. mid range watch market has been decimated by smart-watches)[18]
- demographic changes may lead to staff shortages in longer term[10,12]
- young people more likely to favor online[19]
- smaller, less regular shopping trips[19]
- window shopping is done online[19]

Technological

- eCommerce reduces barriers to entry[9]
- ubiquity of tech / online access
- consumers happy to look online whilst shopping
- increasing suspicion of tech companies[9]

Legal

- Brexit will likely result in significant changes to
  - employment law
  - VAT regulation[3]
  - Import / export regulation
- Legislation 2050 Green plan forthcoming[20]

Environmental

- Online has different environmental constraints: warehouses don't need to be nice
- Desire to reduce waste / carbon footprint where possible.
- Out of town developments blocked with green field laws[10]
- reduction of traffic: carbon neutral by 2050[20]
- moves towards making businesses more energy efficient[20]

Sources

[1]gov.uk (2019a)
[2]Parliament. House of Commons (2018b)
[3]Stewart (2019)
[4]Confederation of British Industry (2019)
[5]Ng et al. (2019)
[6]House of Commons (2018a)
[7]Millington et al. (2018)
[8]Findlay and Sparks (2014)
[9]Mintel (2019a)
[10]Burt and Sparks (no date)
[11]Office for National Statistics (2019a)
[12]Euromonitor International (2019a)
[13]Local Data Company (2019)
[14]Bank of England (no date)
[15]Bradstreet (2019)
[16]Office for National Statistics (2019b)
[17]Euromonitor International (2019b)
[18]Mintel (2019b)
[19]Sabanoglu (2019)
[20]gov.uk (2019b)

Figure 4: PESTLE analysis

The overriding theme is the uncertainty of Brexit, and the resulting diminished consumer confidence, highlighted by Confederation of British Industry (2019a). Despite increasing wages and disposable income (Euromonitor International (2019b)) sales are subdued. The Confederation of British Industry argue that this uncertainty will extend at least another fourteen months. (2019a)

Sector Analysis

Porter's Five Forces analysis is performed at the level of the sector. Unlike PESTLE, the analysis will have more direct relevance in the medium term.
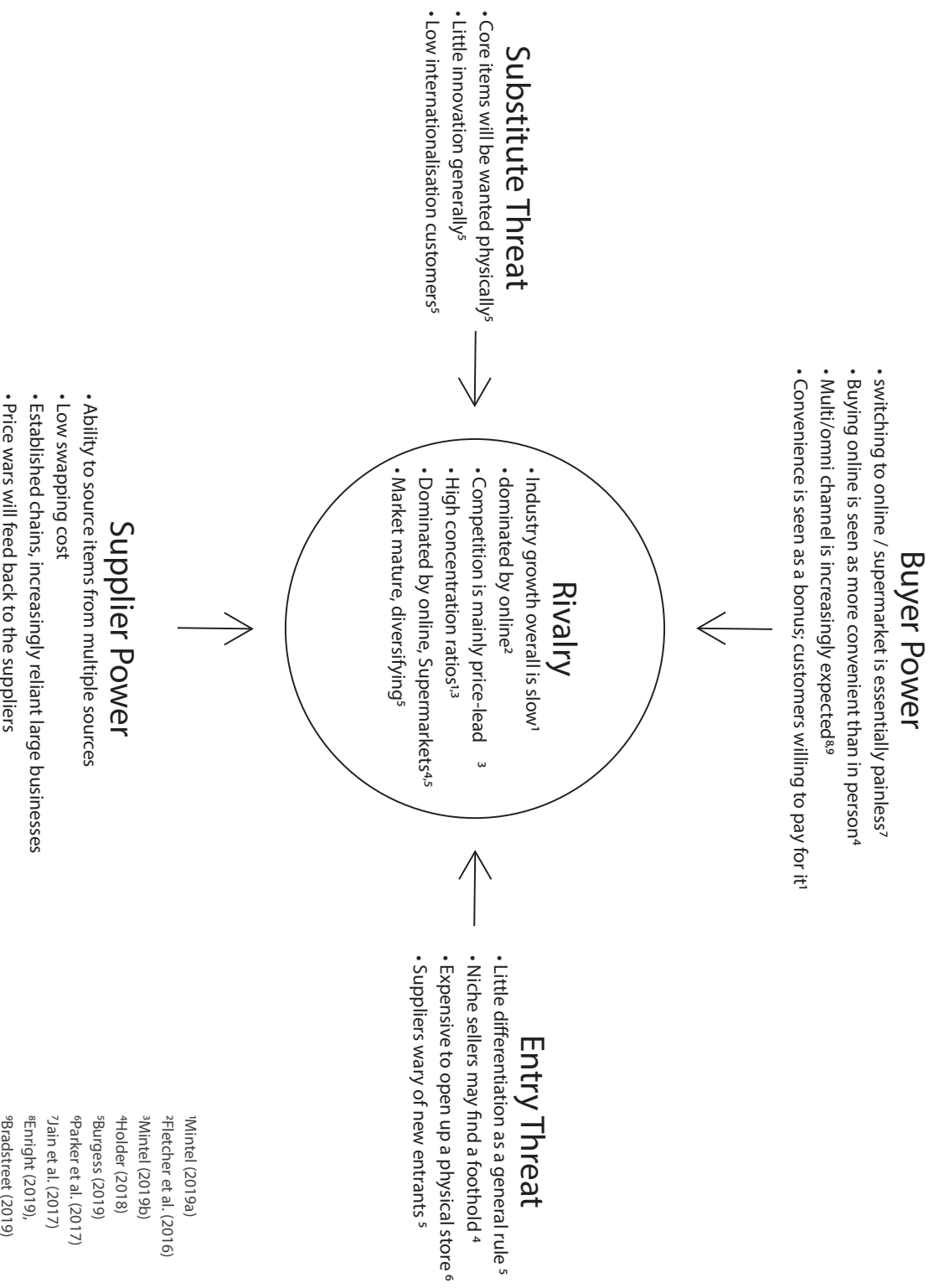
Buyer Power

- switching to online / supermarket is essentially painless[7]
- Buying online is seen as more convenient than in person[4]
- Multi/omni channel is increasingly expected[8,9]
- Convenience is seen as a bonus; customers willing to pay for it[1]

Substitute Threat

- Core items will be wanted physically[5]
- Little innovation generally[5]
- Low internationalisation customers[5]

Rivalry

- Industry growth overall is slow[1]
- dominated by online[2]
- Competition is mainly price-lead[3]
- High concentration ratios[1,3]
- Dominated by online, Supermarkets[4,5]
- Market mature, diversifying[5]

Supplier Power

- Ability to source items from multiple sources
- Low swapping cost
- Established chains, increasingly reliant large businesses
- Price wars will feed back to the suppliers

Entry Threat

- Little differentiation as a general rule[5]
- Niche sellers may find a foothold[4]
- Expensive to open up a physical store[6]
- Suppliers wary of new entrants[5]

Figure 5: Porter's Five Forces Analysis

[1]Mintel (2019a)
[2]Fletcher et al. (2016)
[3]Mintel (2019b)
[4]Holder (2018)
[5]Burgess (2019)
[6]Parker et al. (2017)
[7]Jain et al. (2017)
[8]Enright (2019),
[9]Bradstreet (2019)

The analysis yields some familiar themes. The combination of Supermarkets, Online and retail parks is squeezing the high street. Additionally, consumers have increasingly volatile shopping habits; regularly swapping retailers based on price, service, or convenience (Linott (2019)). A positive theme is the renewed political will to protect the high street.

Plotting these forces on a spider chart makes it clear businesses need to focus on their consumers and rivals foremost.
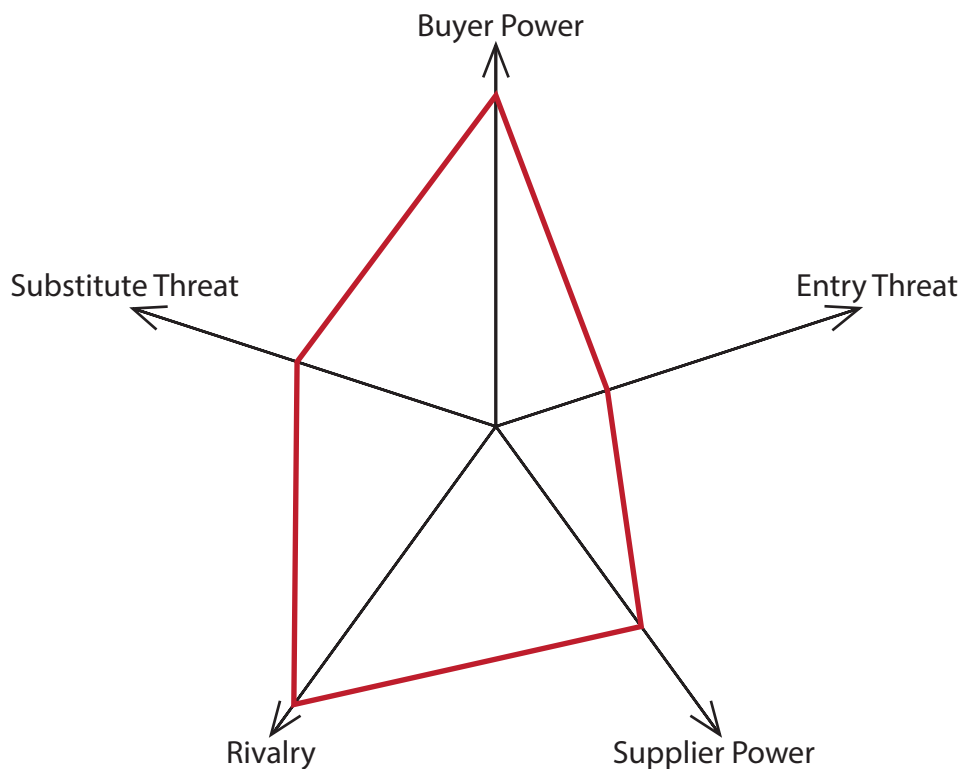

figure 6: PESTLE analysis plotted on a spider diagram

Organisation Analysis

Using SWOT analysis allows identification of themes internal to the organization. This is key for short term planning. Mindful of the five types of business identified in the analysis of Burnley retail, this analysis has been done in broader terms.

Strengths	Weaknesses
• recognition / trust higher for shops with history[1] • Reasonable footfall; shoppers will be in the area anyway (unlike online)[2] • 16% of population live within 200 metres of the high street Office for[3] • Integral part of local infrastructure & community • customer service is easier face-to-face[4] • perception of being more environmentally conscious[5]	• shrinking / seasonal capital[6] • comparative expense of high street rents / business rates etc [7,8,9] • shrinking profit margins and profit margins[10] • perception as being dated[4] • advertising limited / less directed • audience arguably too wide: trying to be all things to all people[11] • limited / no integration with website • unrefined, wasteful supply chain • more susceptible to shoplifting[6]
Opportunities	Threats
• seasonal trends[2] • data collection to increase understanding [12,13] • chains with multiple stores have multiple opportunities to change peoples opinions • improve marketing using e-retail information[13] • omnichannel retail: chains have a ready-built distribution[14]	• weather-bound Office for[15] • cheaper alternatives[16,17] • undercutting themselves (inconsistency) • potential reduction of consumer spending[18] • supply chain breaking (e.g. late deliveries)[19]

[1]Mintel (2019b)
[2]Burgess (2019)
[3]National Statistics (2019)
[4]Resnick, Foster and Woodall (2014)
[5]Mintel (2019c)

[6]Bradstreet (2019)
[7]Parliament. House of Commons (2019)
[8]Burt and Sparks (no date)
[9]Leunig (2012)
[10]Confederation of British Industry (2019b)

[11]Mintel (2019a)
[12]Buckley and Patton (2019)
[13]Scheibenreif (2019)
[14]Deloitte (2014)
[15]Office for National Statistics (2018)

[16]Ruddick (2015)
[17]Dover (2016)
[18]Confederation of British Industry (2019a)
[19]Hines (2014)
[20]Parker et al. (2018)

Figure 7: SWOT analysis

Businesses typically suffer from a wasteful supply chain and high rents, however there is an increasing market for ethical, locally sourced goods Baker (2019) that the high street is uniquely placed to deliver.

Advice

The advice here is split into three horizons, the short, medium and long term. This should allow the guidance to be adopted into existing plans.

Short Term

In the short term the focus must be on stemming or reversing the direction of travel. The choice of actions is based on balancing minimal expense with high impact results. This is intended to ensure that businesses are not unduly exposed during the current period of negative growth Office for National Statistics (2019d), customer uncertainty and the annual peaks of Christmas. In this window, we can simply group actions under three categories; *Stop*, *Carry On*, and *Start*.
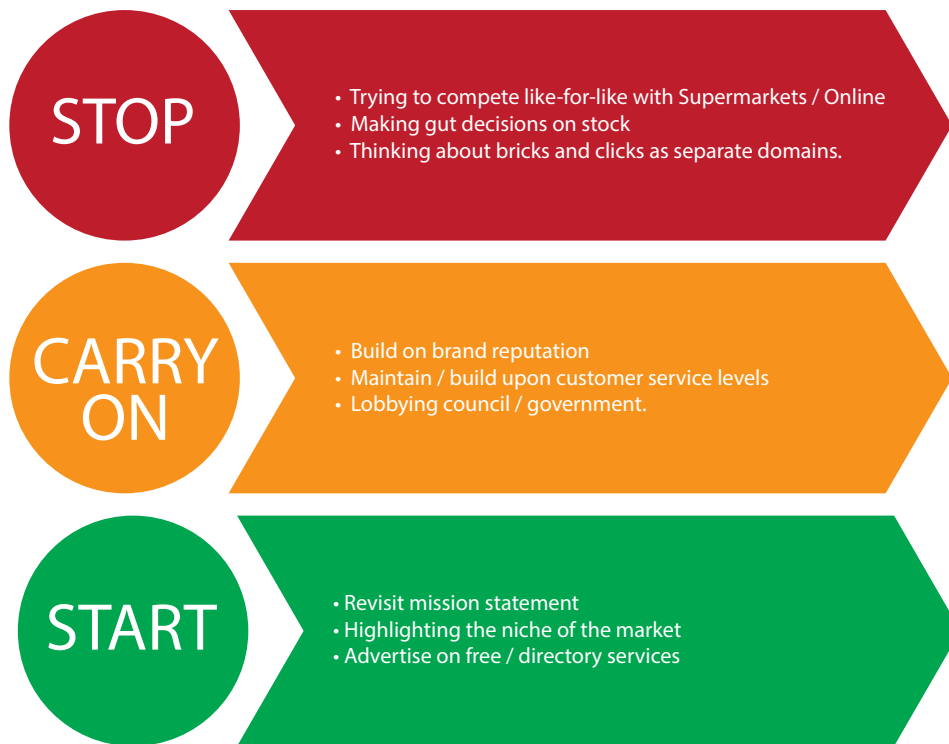
STOP
- Trying to compete like-for-like with Supermarkets / Online
- Making gut decisions on stock
- Thinking about bricks and clicks as separate domains.

CARRY ON
- Build on brand reputation
- Maintain / build upon customer service levels
- Lobbying council / government.

START
- Revisit mission statement
- Highlighting the niche of the market
- Advertise on free / directory services

Figure 8: Stop, Carry On and Start Actions

Stop

Attempting to compete with major online retailers and supermarkets on their own terms is widely cited as the reason for the spectacular failure of Toys 'R' Us News (2018). A key step towards maintaining competitiveness is to ensure stock is appropriate for the market. In the short term, particular care must be paid to stock, specifically reducing levels of products that the business cannot successfully compete on price (Burgess (2019)).

Stopping overstocking products will have the dual benefit of reducing outgoings and increasing the potential retail space Mintel (2019f) Bradstreet espouses this focus on turnover (2019). Howells, expands on this by arguing there is no longer the leeway to absorb bad gut decisions (2010).

The idea of bricks and clicks being separate domains also needs to end. Burgess (2019) reports that the market is aggressively reducing barriers to sales. This chimes with Linnot's observation that convenience is king(2019) . Whilst a move to omnichannel is neither simple nor cheap, it should be considered to be a long term goal. Changing the mindset around online versus physical will help future efforts in this regard. In the short term, small changes such as leveraging online sale information to inform decisions made in physical stores should be considered.

Continue

Building on brand reputation can take a two-pronged approach. Identifying customer desires is an integral part of this. Strengthening brand reputation should be informed by both online and physical offerings; using social media as suggested by Nash (2019) is a cost-effective way of achieving this.

Parker, Quin and Millington argue that customer service is king (2018). This is one area which must be actively maintained. Again, the high street is ideally placed for this; Parker, Ntounis and Quin (2014) highlights the social aspect of this service, a point echoed by Ryu and Fortenberry (2017) and Khanwala (2019) notes that as tech advances, consumers increasingly crave 'real' interaction.

Lobbying local government and the council is something that businesses should continue. The council can affect parking, business rates, levels of footfall, and vacancy (Parliament. House of Commons (2018b)) A local example of this is Preston who have managed improve the health of the high street by focus on people who visit it Hopkins (2019).

Start

Businesses should question their mission statement to confirm it remains valid, and they meet it. Following the advice from Parker, Quin and Millington (2018), seeking feedback from consumers is a key first step, particularly given the volatility of customer loyalty.

Parker argues that small changes based on this feedback such as altered opening hours (.ibid) can have dramatic effects. Other initiatives such as introducing free Wi-Fi have been proven to increase dwell time, and make businesses a meeting place (Goldstein (2016)), enhancing the social aspect of shopping.

High street businesses are at a distinct advantage when it comes to proving their ethical credentials. a regular theme of Mintel reports is the desire from consumers for ethical business (Mintel (2019d), Mintel (2018), Holder (2018)). This is undoubtedly in response to the plummeting levels of trust in online behemoths reported by Mintel (2019b). Businesses can also highlight other unique selling points such as "buy local" schemes, or products/services exclusive to them.

To fully leverage their niche in the market, businesses should ensure that consumers can hear their message. Using online directories such as Google Business, bing.com, 192.com, et al.to maintain business information is a low-cost, low effort task that can drive consumers to businesses. Backing this up with social media is a strategy promoted by Dover (2016) and Falcao (2019). Mindlessly sending out information over social media will not drive sales, instead offering expertise is key; customers are more likely to make a purchase based on a trusted, expert voice.

Medium Term

In the medium term, the focus must on solidifying the core of the business by investing in technologies that:

- Simplify the supply chain
- help grow the customer base
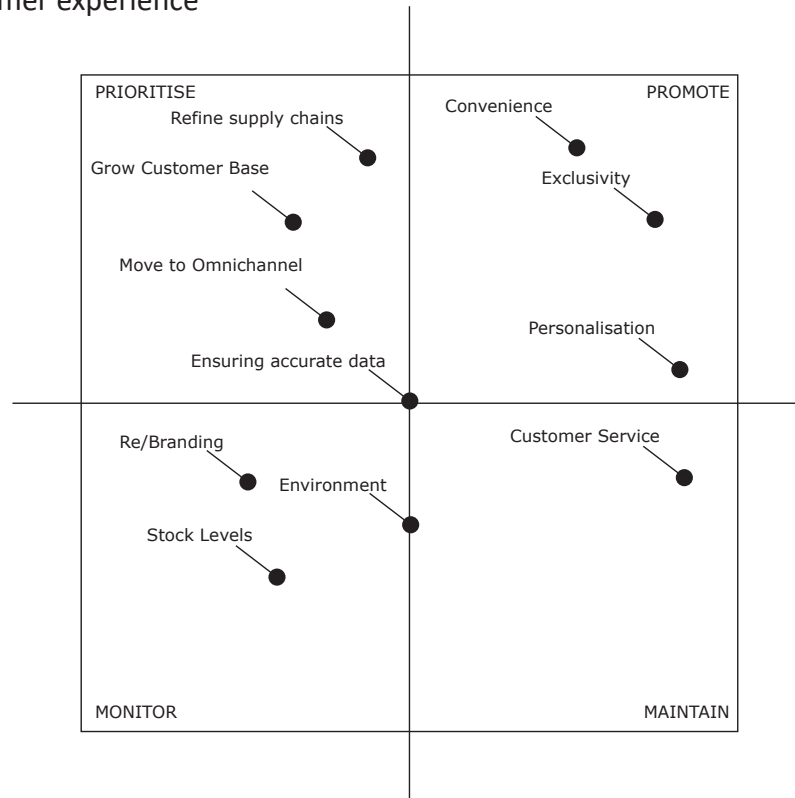- homogenise customer experience

PRIORITISE

Refine supply chains

Grow Customer Base

Move to Omnichannel

Ensuring accurate data

PROMOTE

Convenience

Exclusivity

Personalisation

Re/Branding

Environment

Stock Levels

Customer Service

MONITOR

MAINTAIN

Figure 9: Where to Focus Effort

Using the customer insight gained in the short term, businesses can target existing and potential consumers. Targeted advertising, recommended by Ry (2015), or loyalty schemes, recommended by Bradstreet (2019) is an obvious first step; customers can be enticed back using tcontact detailsharvested via free Wi-Fi. Customer feedback can be used to tailor products and services, a strategy recommended by Ruddick (2015).

The customer insight can inform decisions around stock levels, enabling businesses working with suppliers to shorten economic cycles. Cohen and Roussel (2013) suggests this is essential to make sure the right products are in front of the right consumers at the right time. Burgess expands on this by arguing a portfolio of exclusive products will keep consumers returning (2019). Key to this strategy is "Just in Time" supply chains which Hines (2004) argues will transform business.

Making sales seamless is a key part of the strategy. Fujitsu (2017) report that click and collect will triple. This move can form part of a virtuous circle. Aloysius, Hoehle and Venkatesh (2016) argue the more sales processed through a centralized system results in more responsive stock management and customer insight. Pantano and Gandini (2018) hint feeding this into social media strategy can present customers with a seamless, unified experience.

Long term

Businesses should be concerned with finding ways of expanding the business itself in the longer term. The guidance here is vaguer; and needs to be tempered by the company mission, however key recommendations are:

• Horizontal integration with services
• AI based "stockless" supply chains
• Experiments with pop-up-shops

Horizontal integration with services is a key area which businesses may expand into. Holder (2018) notes that expansion into related services (such as dog grooming for a petshop) is a clear, and growing demand. Giving consumers the chance to receive a service and buy sundries under one roof helps businesses can maximise sales potential, something that Mintel (2019d) noted was sorely lacking at present.

Despite earlier phases addressing waste in the supply chain, the long term strategy consider a Vendor Managed Inventory (VMI) supply chain. Hetu (2018) espouses the benefits of AI based "stockless" supply chains which ensure that stores carry only the stock required. This approach he argues ensures an end to cyclical "flood/drought" ordering. Cohen and Roussel (2013) warns adopting VMI can be highly disruptive to the culture and structure of the business, a view echoed by Hines (2004) who highlights the high levels of trust required; the veracity and quality of goods is assumed rather than explicitly checked throughout the supply chain. Additionally, Hines (2004) cautions that a decision to use VMI is a balancing act between the cost benefit and potential lock-in.

Fernie and Sparks (2009) suggests that even with a lean supply chain there is a potential to reduce physical waste (packaging) in the chain. Which could future proof against the Government's 2050 plan (gov.uk (2019b))

Another way to drive new customers to the high street is to create experiences beyond retail. Milt (2017) argues that the high-street of the future will be smaller and more diverse, and customers will go primarily for leisure. this is a sentiment echoed by Euromonitor International (2019a). The use of pop-up shops is a relatively recent phenomenon, but one that meets the "leisure-ification" trend; seen in the Boots "selfie booth" Falcao (2019), city-break tourism (Parker, Ntounis and Quin (2014)) and even "sponsored locations" in Pokemon Go (Morrison (2016)).

Falcao (2019) suggests that the use of pop-up shops can generate a marketing buzz, as well as a test-bed to try out new ways of selling that can drive and inform change in the longer term. Parker, Quin and Millington (2018) argues that pop-up shops contribute to the overall health of the high street.

Whilst major retailers are actively investing in cashier-less stores (Bernal (2019)), this may be an area where caution is best exercised. The cost savings of staffing may be undermined by diminished customer service despite eradicating queues that Sabanoglu (2019) cites for dissatisfaction with the high street. A more obvious use of this 'scanless' technology demonstrated by MishiPay (Khanwala (2019)), and Fujutsu (2017) allows consumers to get information on products based on price tags. This technology would allow colleagues to remain experts whilst the technology performs the low value "grunt work".

Final Thoughts

Despite turbulent conditions, the high street has a key place in the future of retail. Urgent action is required to reverse the fortunes of the High street, but through the use of the judicious use of analytics, social media and slimmed supply chains, businesses continue to serve customer needs in a responsive, agile way.
Technology also offers the promise of offloading effort and risk from stock ordering and management. Despite the potential risks of VMI, the rewards could be transformative for smaller businesses
Using technology to pivot to a hybrid of online and physical experience will be key to survival, businesses that adopt technology to gain customer insight, and use this for marketing may well find themselves the John Lewis' of the future.

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